

# **Managing Your Requests in iLab**

The Vanderbilt's iLab Site is: <https://vanderbilt.corefacilities.org/landing/2191>

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To set up a new iLab account, and/or check the basic functionalities for your account, please go to our [Setting Up a New iLab User Account Guide](#) for instructions.

**Please Note:** All VUMC Departments will begin with “VUMC - ” before the department name. When users from VUMC wish to utilize a VU Core, they must select their **(VU) Lab**. Any requests or reservations using a (VUMC) Lab will be rejected and/or canceled, and the user will be notified they must resubmit their order or reservation using a (VU) Lab that they are a member of. For users to join a (VU) Lab, Department, or to have a Lab created, they must already have an iLab account, and must submit the [form](#) that correlates with their role.

## Managing Your Requests

You can access your submitted requests from multiple places once logged into iLab. If you have logged in through the institution's landing page, you will be taken to your dashboard. There will be a list of your most recent requests on the dashboard page. If you would like to review one of these requests, click on the request name.

If you would like to review all the requests you have, you can access all of your requests from the **view requests** link in the left hand menu, which will list all your requests across all the cores in iLab.

If you are on a specific core's landing page, you can also view your requests for that core by clicking on the **View My Requests** tab.

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Reload Active Requests

▼ active requests

Searching within active requests: Results in this tab are restricted by Status ([show details](#))

◀ Hide Filters

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Reload Active Requests

▼ active requests

active requests  
all requests  
equipment scheduling  
draft requests  
information gathering  
awaiting financial approval  
financials approved  
processing  
completed  
cancelled  
all except cancelled

date	for	service_id
Oct 30 (Oct 30 2017)	Grace Researcher OCGA Test (V.U) Lab	VUMTC-GR-29 Neurochemistry
Oct 27 (Oct 27 2017)	Grace Researcher OCGA Test (V.U) Lab	VUMTC-GR-27 Test
Oct 27 (Oct 27 2017)	Grace Researcher OCGA Test (V.U) Lab	VUMTC-GR-28 Test
Oct 24 (Oct 24 2017)	Grace Researcher OCGA Test (V.U) Lab	CITC-GR-26
Oct 17 (Oct 17 2017)	Grace Researcher OCGA Test (V.U) Lab	CIT-GR-25
Oct 17 (Oct 17 2017)	Grace Researcher OCGA Test (V.U) Lab	Mass Spec Project 1
Oct 10 (Oct 10 2017)	Grace Researcher OCGA Test (V.U) Lab	Project 13 Trial cancer, purple, stain
Sep 27 (Sep 27 2017)	Grace Researcher OCGA Test (V.U) Lab	CIT-GR-21
Sep 25 (Sep 25 2017)	Grace Researcher OCGA Test (V.U) Lab	CIT-GR-20
Sep 21 (Sep 21 2017)	Grace Researcher OCGA Test (V.U) Lab	CIT-GR-17

Apply Filters  
Reset Filters  
Create Tab from Filters  
Download Results as CSV

- The page will automatically open to your **Active Requests**. Your active requests include all requests that require either the core's or your approval, requests that have yet to begin, and those that are in the processing status.
- A request can remain in the **processing** status for the length of the project/request. This could be a one-time request, a one-month project, or a multi-year project.
- If you want to go to a completed or cancelled project, click on the **active requests** link under the **Reload Active Requests** button. You can either select **All Requests** or **Completed** to view them.
- Use the filters on the left hand side to filter your requests list.

**Request Status:** On your request page you can see the status that the request is in. Please reference the Request Status Guide below for further information on the most common statuses.

<a href="#">date</a>	<a href="#">for</a>	<a href="#">service id</a>	<a href="#">status</a>	<a href="#">cost</a>
▶ Oct 30 (Oct 30 2017)	Grace Researcher <a href="#">OCGA Test (VU) Lab</a>	VUMTC-GR-29 Neurochemistry	Waiting for Core to Agree	\$12,944.40 (\$11,256.00)
▶ Oct 27 (Oct 27 2017)	Grace Researcher <a href="#">OCGA Test (VU) Lab</a>	VUMTC-GR-28 Test	Processing	\$2,630.45 (\$2,630.45) Stefanie Du...
▶ Oct 27 (Oct 27 2017)	Grace Researcher <a href="#">OCGA Test (VU) Lab</a>	VUMTC-GR-27 Test	Waiting for Researcher Approval  <a href="#">▶ Agree</a> <a href="#">⊖ Disagree</a>	\$0.00 (\$0.00)
▶ Oct 24 (Oct 24 2017)	Grace Researcher <a href="#">OCGA Test (VU) Lab</a>	CITTC-GR-26	Waiting for Financial Reapproval  <a href="#">▶ Reapprove</a> <a href="#">⊖ Deny</a>	\$0.00 (\$0.00) Jessie Brown, Em
▶ Oct 17 (Oct 17 2017)	Grace Researcher <a href="#">OCGA Test (VU) Lab</a>	CIT-GR-25	Completed	\$1,033.70 (\$1,033.70) Jessie Brown, Ste

- **Waiting for Core to Agree:** this indicates that the core is still considering your request.
- **Waiting for Researcher Approval:** this indicates that the core has submitted a request on your behalf, and is awaiting your approval to begin work. If it states that it is a **reapproval**, it means that changes have been made to the request.
- **Waiting for Financial Approval:** this indicates that financial approval is needed. This is usually in tandem with a quote that has been generated. If it states that it is a **reapproval**, it means that changes have been made to the request and/or quote.
- **Processing:** this indicates that the request is currently being worked on. Again, a request will remain in the processing status for the length of the project. This could be a one-time request, a multi-month project, or a multi-year project.
- **Completed:** This means the core has completed all work in relation to the request/project. Should you need more work to be done on a request/project after it has been completed, inform the core, and the status will be updated.

## Icons:



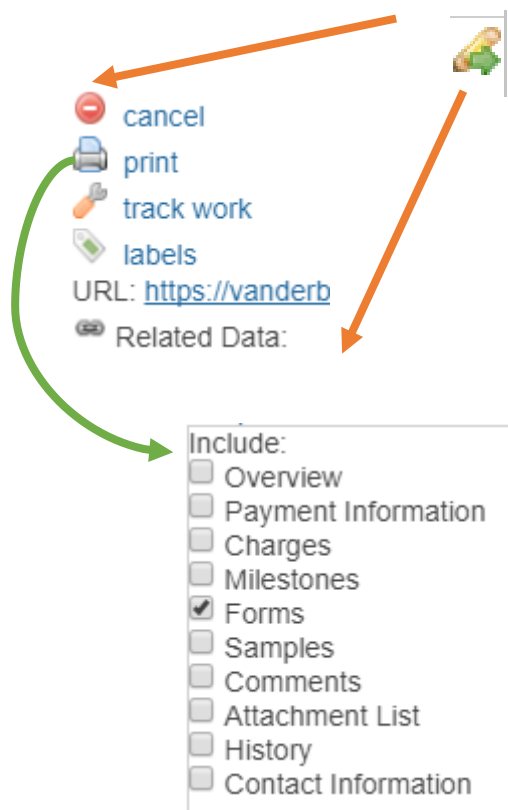
You will see three icons on each request row: a dollar sign, message bubbles, and a pencil with a green arrow. Please see the key guid below for futher explanation.



- **Dollar Sign - \$:** There are three dollar sign icons. One with a blue check mark, one with a pencil and one with a warning sign.
  - \$ with blue checkmark:** The blue checkmark indicates that there is a valid fund number attached to the request.
  - \$ with pencil:** The pencil indicates that there is no fund number attached to the request, and you must select a fund number. Please see the following [section](#) on how to update your payment information.
  - \$ with warning sign:** The warning sign indicates that the fund number that was associated with the project is no longer valid, or that you no longer have access to it. You will need to update the payment information. Please see [below](#).



- **Message Bubble:** You can send a message to the core directly from this bubble by checking the box next to **Persons responsible**.
- You will also be able to copy your department manager, lab managers that have been elected as financial contacts for your lab, your principal investigator(s).
- You can elect to copy yourself to the email by leaving the box checked indicating *send me a copy of this email*.
- All communications regarding the request that are made from here will all be archived with the project/request under the comments section. Please see the [comments section](#) for further instructions.



If you click on the **pencil with the green arrow**, a pop up window will appear. From here you can:

- **Cancel** your request. Please note, this cannot be done if the request is in the processing status.
- **Print** your request. You can select what you would like to include in your printout by checking the relevant boxes.
- **Track work** allows you to see who in the core has been assigned to your work. This is dependent on the workflow process of the core, not every core assigns staff.
- The **URL** link provided is for the specific request. This can be used to send to the core, your PI, Lab Manager or Department Manager if they wanted to review the request.

**Updating or Changing Payment Information:** To update your payment information on a request, or change it, click on the \$ dollar sign.

charge	billing status	Center Number	amount	
High content screening microscopy - hourly rate	Ready To Bill	1551150015	\$500.05	<input checked="" type="checkbox"/>
LC-QQQ - hourly rate	Ready To Bill	1551150015	\$168.36	<input type="checkbox"/>
Custom Development - hourly rate	Not Ready To Bill	1551150015	\$206.74	<input type="checkbox"/>
Data Processing and Analysis - hourly rate	Not Ready To Bill	1551150015	\$227.08	<input type="checkbox"/>

selected charge(s) total: \$0.00

Amount currently due: \$668.41

▼ Update payment info for selected (4) charges

Center Numbers 1 100.0% 1551150015 - OCGA Dept Test #5 (Does not expire)

100.0% total allocated

☒ make default for project?

payment notes

Split Charge

save cancel


Here you can update the payment information by line, or for the entire request.

- Please click on the checkbox next to the line you would like to update. If you want to update all the lines, you **must** check all the boxes.
- You can select the fund number from the dropdown menu. You will only see your valid center numbers that you have been given access to.

If you are missing a fund number from this dropdown list, please contact your department manager, principal investigator or lab manager.

- The option to make the payment set up a default for the project will be automatically checked. If you do not want this payment option to become a default for this project/request, please uncheck the box next to *make default for project*.
- To split the charge amongst more than one center number from your lab, click on the *Split Charge* button.
- Press the *Save* button when you are done.


## Reviewing Your Request/Project Overview: Quotes, Comments, Attachments, Etc.

**1**  Oct 10 (Oct 10 2017) Grace Researcher OCGA Test (VU) Lab Project 13 Trial Processing Sample Processing \$668.4 (\$1,10: cancer, purple, stain Jessie

**1)** To view more details on a project, press the arrow to expand the request.

Oct 10 (Oct 10 2017) Grace Researcher OCGA Test (VU) Lab Project 13 Trial Processing Sample Processing \$668.41 (\$1,102.23) cancer, purple, stain Jessie Brown, Stefanie Du..., Magdalena P..., Emma Pacilli, Heather Wat..., Stacy Sherrod, Vanessa All...

Overview  
Payment Information  
Forms and Request Details

**2**  [View Form](#) MS Based Omics Form Completed

**3** Sample Processing description: duration: 3 days target date: Oct 12, 2017note: click to edit Not Started

	description:	duration:	target date:	note:	Quantity:	Unit Price:	Total:	Billing Status:	Work Status:
Oct 10 01:14 PM	High content screening microscopy - hourly rate High Content Screening Microscopy (Internal )	5.0			5.0	\$100.01	\$500.05	Ready To Bill	Completed
Oct 10 01:14 PM	LC-QQQ - hourly rate Targeted Omics Assays (Internal )	2.0			2.0	\$84.18	\$168.36	Ready To Bill	Completed
Oct 10 01:17 PM	Custom Development - hourly rate Staff Hourly Rate Fees (Internal )	2.0			2.0	\$103.37	\$206.74	Not Ready To Bill	Financials Approved
Oct 10 01:17 PM	Data Processing and Analysis - hourly rate Data Processing and Analysis (Internal )	4.0			4.0	\$56.77	\$227.08	Not Ready To Bill	Financials Approved

**4** Events: Resource

Resource	Start time	End time	Total duration	Expected cost
Alex Rutledge (Alex Rutledge Calendar)	23 Oct 16:00	24 Oct 10:00	18.0 hours	\$818.28
High Resolution Mass Spectrometer (Thermo, QE-HF) (High Resolution Mass Spectrometer Thermo QE-HF)	23 Oct 16:00	24 Oct 10:00	18.0 hours	\$1,911.78
Alex Rutledge (Alex Rutledge Calendar)	02 Oct 16:00	04 Oct 10:00	42.0 hours	\$4,341.54
High Resolution Mass Spectrometer (Thermo, QE-HF) (High Resolution Mass Spectrometer Thermo QE-HF)	02 Oct 16:00	04 Oct 10:00	42.0 hours	\$0.00
<b>Total:</b>				<b>\$7,071.60</b>

**5** Comments

[add comment](#)

Nov 03 '17 04:43 PM Grace Researcher said  
Payment information updated

Oct 10 '17 01:19 PM Emma Pacilli said  
Update Payment Info

**6** Attachments & URLs

[add attachment](#) [add url](#)

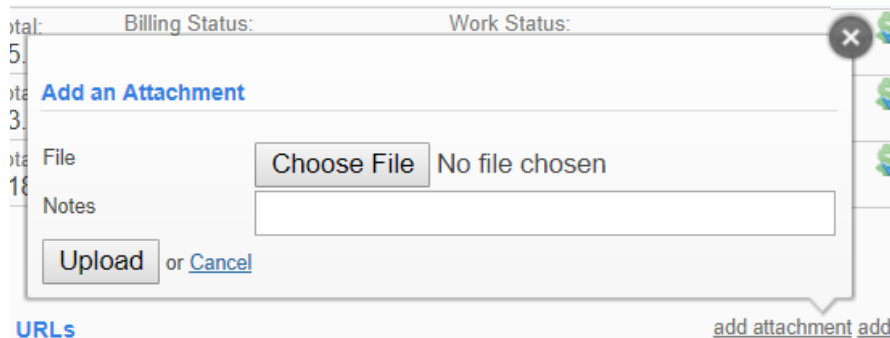
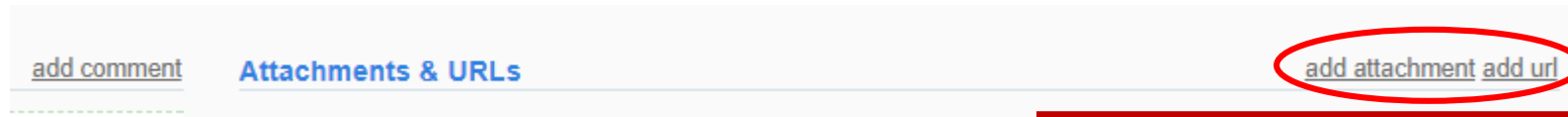
Project 13 Trial quote 131810102017.pdf Emma Pacilli 2017 Oct 10 @13:18

Service Request History  
Billing Information  
Shipping Information

- 2) If a form was required, the request will usually open with the form expanded. Please see the different request sections to see the different forms that are connected to requests for this core. If you need to expand the form, just click on the **View Form** link. You will be able to edit the form, unless it has been locked by the core.
- 3) You will see your service line charges. Services lines can be charged and billed on a request though the project remains open. You will be able to see the billing status for each service line. For further information about the specific service line, press the arrow next to it to expand.
- 4) You will be able to see all your reservations, and the charges, under **Events** if you have linked your reservation(s) to your project.
- 5) You will see comments here from the core, and you can message back and forth on the request/project. Just click the **add comment** link.
- 6) Quotes, URLs, and attachments will all be archived with the project/request. To add an attachment or url, click the **add attachment** or **add url** link.

## Attaching Files, Documents and URLs to a Submitted Request

To add attachments to your request, or URLs, please click on the *add attachment* or *add url* link to the right of the **Attachments & URLs** heading toward the bottom of the request.



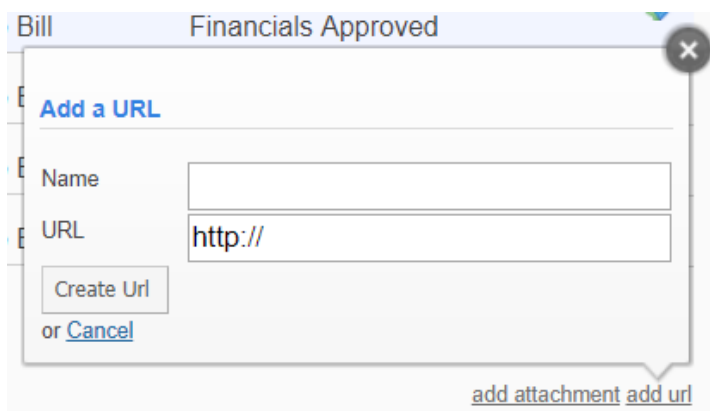
When you click on the *add attachment* link a window will open for you. You can then choose the file you wish to upload, write a note, and then click on the **Upload** button

The attached document will be attached to the request. You will be able to see who uploaded the document, the date and time, as well as the file size and any notes entered.

Any Quotes that have been generated for the project by the core will also be shown here. Please see to [quotes section](#) for further explanation.

Please note, all documents will be archived with the project. This allows you to track versions readily.

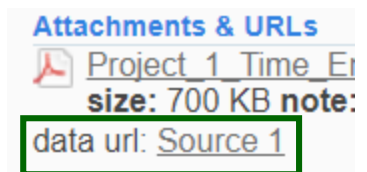
If a document was uploaded incorrectly, you will need to contact the core to remove it. You can do so by leaving a comment. Please see the [comments section](#) for more information.



When you click on the *add url* link a window will open for you.

You can choose to name the URL for clarification. Once you have entered the URL, click on the **Create URL** button.

The URL will show up under the **Attachments & URLs** section.



To open the link, click on the name or URL. If you would like to edit the link, or delete it, hover over the link, and a pencil and a red X will appear to the right of the link.





## Receiving and Reviewing Quotes

If a quote has been generated, you should receive an email notifying you. Quotes reside under the [Attachments & URLs](#) section in the request. Like attachments, you will see which core staff member generated the quote, as well as the date and time the quote was generated.

If additional quotes are generated, they will be added to the attachments list. All quotes are archived in the attachments list.

If you click on the file name, the quote will be downloaded onto your computer. Quotes can have a **Projected Cost**, as well as **Known Charges**. Known Charges will encompass line items the core expects to be included to complete the work. The Projected Cost may be higher to account for potential additional costs. Any queries regarding a quote should be sent directly to the core. The comment feature can be used for this. Please see the section directly below for further instructions.

## Receiving and Leaving Comments

[Comments](#)[add comment](#)

To leave a comment on a request for the core, you can either click on the **message bubble** or click on the **add comment** link to the right of the [Comments](#) header.

The core contact will automatically be selected. If you would like a Lab Manager, Department Manager or PI to be notified about the comment, select them from the list. This can be especially helpful if payment information needs to be updated.

If you do not want to receive a copy of the email, **deselect** the **Send me a copy of this email** box under the email text field.

Press the **Send Message** button to send the comment.

Once you have sent the comment it will appear under the [Comments](#) header. The date and time will be shown, along with the sender's name. All comments will be archived in this section.

[Comments](#)[add comment](#)

Nov 22 '17  
10:53 AM

Grace Researcher said  
Please let me know if you need any additional documents for this request.

Financial managers:

☐ Emma Pacilli<emma.pacilli@vanderbilt.edu> Phone: (615) 875-8154

☐ Grace Researcher<stefanie.dunnegan+9090@ilabsolutions.com> Phone: 6143221572

☐ Sherry PI<sherrypi@vu.edu> Phone: (primary contact)

Department managers:

☐ Emma Pacilli<emma.pacilli@vanderbilt.edu> Phone: (615) 875-8154

☐ Peyton DeptAdmin<peytondeptadmin@vu.edu> Phone:

Principal investigators:

☐ Emma Pacilli<emma.pacilli@vanderbilt.edu> Phone: (615) 875-8154

Researcher:

☐ Grace Researcher<stefanie.dunnegan+9090@ilabsolutions.com> Phone: 6143221572

Core contacts:

☒ Emma Pacilli<emma.pacilli@vanderbilt.edu> Phone: (615) 875-8154

Additional Email Addresses

Email content:

Message(optional):

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☰

☷

p

Send me a copy of this email

☒

Send Message